

HOW TO Sponsor a Requestor (MMP)

Definition of a Requestor and their responsibilities

Requestor = Individual who may complete and submit an order with a FOAPAL in the McGill MarketPlace (MMP).

- Fund Financial Managers (FFM) or Principal Investigators (PI) are automatically considered to be Requestors.
- FFMs or PIs may **sponsor individuals** as Requestors.

Sponsorship Records

To become a Requestor, a Sponsorship record must be created and a Fund Financial Manager must confirm this record.

Sponsorship records may be created in Minerva through the **Finance (Fund) Administration > Procurement Administration menu**:

- By the Fund Financial Manager (FFM) - once created, these records are considered to be "confirmed".
- On behalf of a Fund Financial Manager (FFM) - once created, email alerts are sent once daily at 10:30am to the FFM/PI informing them that there are pending records awaiting confirmation.

How to Sponsor a Requestor or View Sponsorship Records

1. Log in to [Minerva](#).
2. Go to the **Finance (Fund) Administration** Menu
3. Select the **Procurement Administration** menu option
4. Click on the **Sponsor a Requestor** menu option
5. If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), go to step 7. In the **FFM ID** field, enter the McGill ID of the Fund Financial Manager / Principal Investigator. Click on Search if the ID is not known.
6. Hit the **TAB** key to validate the ID. The FFM's name will appear next to the field.
Note: In the bottom half of the page, a listing of individuals already sponsored by the FFM will appear.

Hover over the McGill ID of the sponsored individual to **view** who requested the sponsorship record. An info box will be displayed - "Requested by: First name Last name".

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The screenshot shows a web form with the following fields and elements:

- FFM ID:** A text input field with a "Search" button next to it.
- ID of Intended Requestor:** A text input field with a "Search" button next to it.
- Expiry Date (DD-MON-YYYY):** A text input field.
- Submit:** A blue button.
- Search Results:** A table with the following entries:

15011111 - James Parsons	in effect indefinitely
15011111 - Requested by [redacted]	in effect indefinitely
15011111 - James Parsons	in effect indefinitely

7. In the **ID of Intended Requestor** field, enter the McGill ID of the individual being sponsored to procure (place orders using a FOAPAL). Click on Search if the ID is not known.
8. Hit the **TAB** key to validate the ID. The individual's name will appear next to the field.

*If the following message appears you will **not** be able to complete the sponsorship record today:*

The screenshot shows an error message in a table-like structure:

ID of Intended Requestor	15011111	Search	15011111 - James Parsons is not able to procure due to an incomplete system profile. Go here to provide the necessary information.
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This individual needs a Finance profile to be created before they may be sponsored. Follow the steps below to **send a request for a Finance profile** to be created. Once processed, FIS Security will send you an email, and then you should return to this menu to create the sponsorship record:

- **Click on the hyperlinked word “here”.**
- Follow the instructions on the screen. You will be prompted to enter information to create a profile for the individual (address, phone number, etc.).
- Clicking on Submit will generate an email sent to FIS Security - a Finance profile will then be created for the Intended Requestor. Once processed (between 3 to 5 business days), you will receive an email with the subject line “MMP FIS Authorization Request”.
- **Once you receive the confirmation email, once again, follow the steps above to create a sponsorship record.** This time when you hit the TAB key to validate the ID of Intended Requestor, there will be no message about an incomplete system profile.

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9. In the **Expiry Date** field, enter a termination date (if applicable).
Note: The format of the date should be 01-MAR-2013 for a date of March 01, 2013.
Sponsorships with termination dates will terminate at the expiry date. As a result, the entire record will be revoked automatically.
10. Click **Submit**.

Once the Sponsorship record is created, the Name and McGill ID of the Intended Requestor will appear in the bottom half of the page.

For all **sponsorship records created on behalf of a FFM / PI**, there will be a message "*Awaiting Confirmation*" displayed next to the name and McGill ID of the intended requestor. These records must be confirmed by the FFM /PI.

How to Confirm or Revoke Sponsorship Records

Fund Financial Managers (FFM) or Principal Investigators (PI) may confirm or revoke records. If you prepared a record **on behalf of an FFM/PI**, you may revoke sponsorships records you created prior to the record being confirmed.

1. If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), click on the **link in the email** you received (log in is required). This will bring you to the Procurement Administration menu in Minerva. Otherwise,
 - Log in to [Minerva](#).
 - Go to the **Finance (Fund) Administration** Menu
 - Select the **Procurement Administration** menu option
 - Click on the **Sponsor a Requestor** menu option
 - In the **FFM ID** field, enter the McGill ID of the Fund Financial Manager / Principal Investigator on behalf of whom you created sponsorship records
 - Hit the **TAB** key to validate the ID.
2. A **list of sponsored individuals**, or those "*Awaiting Confirmation*" will be displayed.
 - Click on the **Confirm** button for each individual that is "*Awaiting Confirmation*".
OR
 - Click on the **Revoke** button to cancel/remove a sponsorship record.
Note: Once a sponsorship record is "confirmed", only the FFM / PI may revoke the record.